REUTERS/Pawel Kopczynski

Yes, And….
Advanced Negotiations in a Project World
Joe Perzel, PMP
December 10th, 2019 – afternoon session

GTS educational events
Engage. Inspire. Inform.

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11/27/2019 12:04 PM

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Agenda

- Background
- The Mechanics of Negotiations
- The Basics – People and Communications
- Accelerators
- Case Studies from the Project World
- Final Thoughts

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Administriva

- Cell phones on stun
- If you need to standup, step out or walk around – please do so
- Short break about halfway through
- Bathrooms are …
- Questions and sharing are encouraged, and rewarded
- Show respect – active listening and disagree with the idea not the person
- We may "park" a topic to help us stay on task
- More information in Addendum when you see an @
- Evaluations: please fill-out – all comments are welcome and appreciated
  - Content, Delivery, Examples/Exercises/Anything else
- Look for the Golden Nuggets

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My Background

- Software development since 1979, Business Analysis and Project Management since 1982, Staff and Program Management since 1983
- Corporate, Not-for-profit, Government, Consulting & Staffing
- Worked in HealthCare, Government, K-12, Higher-Education, Financial, Agri-business, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance
- Roles other than in project, program, portfolio world have included:
  - ✓ Direct selling in consulting industry
  - ✓ Recruiting in staffing and consulting industry
  - ✓ Sales & Marketing role for PMI-MN and several other professional associations

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My Background

Some of the Larger, More Complex Projects

- The management of a 7 month project to create and roll out a family of business products for a healthcare company
- The management of a 2 year rewrite of a custom Sales and Marketing automation system for a global reinsurance company
- The development of a PMO office and corresponding polices, processes and artifacts for a Higher Ed organization
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business
- The 3 year custom development project to design and create a multi-state workers compensation system that would be available for future "sale"
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- The Planning, RFP creation, product selection, deployment and support of a 3 year ITIL and monitoring operations system for a company requiring 99.96% uptime

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My Background

Some of my presentations include:

- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- How to Train your Dragon: a Project Sponsor Primer
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- Joeisms: Leadership Concepts and Other Sage Words of Advice
- Managing Change and Surviving to Talk about it
- Managing Innovation in a Project Management World
- Yes, and… Advanced Negotiations in a Project World
- Everyone is in Sales: Successful Tools & Techniques for Project Leaders
- A "Surefire" way to Ensure Schedule Performance!

This should tell you a couple of things…

- I find titles market & attract attention - which leads to project success
- I can be irreverent, sarcastic and love debates; comments/opinions appreciated
- I focus on the soft skills in project management

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My Background

Some of Sales Experiences

- Spent 17 years working for and owning staffing and recruiting companies
  - ✓ Was lead recruiter for 2 start-up companies that were sold to larger regional firms
  - ✓ Sold OS, Database, development languages technical training to Fortune 500 organizations
  - ✓ Was rainmaker salesman for 2 staffing firms focusing on mid-market organizations who utilized value-add services
  - ✓ Started my own staffing company and grew it from start-up to $5M in sales in 3 years
- Started sales program for PMI-MN and grew it to generating $55k of sponsorship for our conference – all with part-time, volunteer help
- Now selling my services as a consultant, trainer, workshop leader to professional associations needing quality speakers as well as organizations and enterprises looking to improve project delivery with providing their staff improved people, project management or leadership skills

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Introductions

- Name
- Organization
- Role/Title/Duties
- Background (Industry/Applications/Years in Project Management/any experience in Sales)
- At least 1….
  - Learning Goal for today: "I wish I knew how" or "I wish I knew why"
  - What and when was the time you had to negotiate for something?

"My most brilliant achievement was my ability to be able to persuade my wife to marry me."

➢ Winston Churchill

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Goal for today

- Present the principals, tools and techniques of Negotiations
- Offer my viewpoint on how to negotiate a successful, less painful, win-win outcome within the Project World
  - ✓ I will do that by:
    - ❑ Presenting content
    - ❑ Engaging you in a dialogue
    - ❑ Supporting my points with present-day, real-world examples
  - ✓ And offering a bit of humor along the way

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Key Elements

- Yes, and…..
- I presume
- Definitions
- What leads to a negotiation

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The Story of "Yes, And…."

- Started when I realized that….
  - ✓ I was continually getting requests to change scope, goals, timeframes and negotiating resource commitments, etc. …… often by from Sponsor
  - ✓ Being argumentative and competitive was counter-productive
  - ✓ My role in almost all cases wasn't to be "Dr. No" – but to either negotiate following the processes set-up or the best possible outcome
- So I found a better way to react, and "Yes, and…." was born
  - ✓ Recognizes the person and their request/point of view
  - ✓ Gives me a starting point to engage in the required negations
  - ✓ Creates a partnering environment with the other party(s)

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Yes, And …

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I presume -
Most people hate doing "sales"

- Not really sure what it means and/or how to do it
- Don't want to be "that guy" – they think *Used Car Salesman*
- Have a long way to go to be "good enough" at sales
  - ✓ Terminology
  - ✓ Approaches
  - ✓ Negotiations

I presume -
Negotiating is associated with Sales and Selling

- Not in a pleasant sort of way
- Or not thought of at all – just done naturally
- But it is a big part of a good salesperson's job

I presume -
You have been negotiating and selling your whole life

- With spouse/partner, kids, employees, bosses, prospective employer
- It is a requirement for both running a PMO and being a Project Manager
  - ✓ Resources: funding and personnel
  - ✓ Help from Legal, Finance, Marketing, etc.
- If you hate the word "negotiating" think
  - ✓ Partnering – a process to come to a mutual agreement
- If you hate the word "sales" think
  - ✓ Problem solver – the person able to explain the why and/or benefit to the other person
  - ✓ Influencing for good outcomes

I presume -
You want your project …. to be successful

- Requires partnering with others
- Involves a fair amount of negotiations, from the kick-off to lessons learned
  - ✓ Timelines
  - ✓ Scope
  - ✓ Funding
  - ✓ Resources
  - ✓ Help from other departments

I presume -

That sometimes when negotiating you are selling and sometimes you are the buying

- Sponsor (Sr. Executive) / Project Manager
- Project Manager or Business Analyst / SME
- Project Manager or Business Analyst / Functional Manager
- Business Analyst / Project Manager

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I presume -

You're entitled to want everything (or anything), but you are not entitled to get it.

-Amy-Ann Mayberg

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pre·sump·tion (prəˈzəm(p)SH(ə)n/): @

An idea that is taken to be true, and often used as the basis for other ideas, although it is not known for certain.

Rarely have I witnessed assumptions turn into facts.
SONYA TECLAI - THEGOODVIBE.CO

Anything wrong with these presumptions?

1. Hate "sales"
2. Negotiations is part of sales
3. You have negotiated and sold your whole life
4. To be successful
5. Sometimes buyer, sometime seller
6. Your not entitled to always get your way

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Definitions @

- **ABC: (**Always Be Closing): a term referencing that all good "salespeople" should be closing the "sale" at all times
- **QNC** (Qualify-Negotiate-Close): the typical sales cycle from Qualifying the "opportunity" through Negotiating details to Closing the "sale"
- **Buying Cycle:** The best time to approach someone to qualify, negotiate or close the "deal"
- **Objection**: A reason arguing against a premise, argument, or conclusion
- **ROI:** Return on Investment
- **CBA:** Cost Benefit Analysis
- **POC**: Proof of Concept
- **SME**: Subject Matter Expert
- **OBE:** Overtaken by Events: forced to be changed because of something that has suddenly and unexpectedly happened
- **TLA:** Three Letter Acronym, something the world has too many of these days
- **SDLC:** System Development Life Cycle

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Yes, And …

Any QUESTIONS

Yes, And …

The Basics of Negotiations

The Basics

- Sales 101
- Required Skills and Techniques
- Joeisms – Rules to Live By
- Objections

What Leads to Sales and Negotiations

- In the beginning
  - ✓ Access to resources
  - ✓ Scope/Features
  - ✓ Timelines
  - ✓ Budget/Costs
- Throughout
  - ✓ Access to resources
  - ✓ Scope/Features
  - ✓ Timelines
  - ✓ Budget/Costs
  - ✓ Are we "done" yet
  - ✓ Oops

In other words, just about everything…………

Sales 101

- Know how to **qualify** the deal (think validate)
  - ✓ Help me understand what you are hoping to accomplish….
  - ✓ What is your ROI this year/for this project…
  - ✓ If I/we do this….
  - ✓ If this happens….
- **Negotiate** as needed
  - ✓ Benefits
  - ✓ Delivery
  - ✓ Engagement/help
  - ✓ Price
- Go for the **close**
  - ✓ Ask for the "business" (the decision)

Sales 101 – Qualifying

- Know who your buyer(s) are
- Get them engaged
- Know enough to close the deal – research
  - ✓ What they value/don't care about
  - ✓ Do they have any pain that you can take away
  - ✓ Are they the decision-maker – if not who is (or is it a team)
- Understand their "buying cycle"
  - ✓ Not so busy that they are approachable
  - ✓ The time they are in a buying mood
  - ✓ When they can (or will want to) make the "deal"

Sales 101 – Negotiations

- Negotiation is a communication process between two or more parties; in which both sides consider alternatives to arrive at a mutually agreeable solution.
  - ✓ Forging an Agreement
  - ✓ Creating a Partnership
  - ✓ An act of cooperation – NOT confrontation
  - ✓ A "Win-Win" Relationship

Sales 101 – Closing

- Go for the close
  - ✓ Ask for the Decision
  - ✓ Remind them the benefits they will achieve and what they agreed to previously
  - ✓ Document the deal, thank them and run-off
  - ✓ Don't sell past the Close

Slide 1

Buy-in
Teaching Asking
Talking Persuading Coaching
Helping Conversing Differentiating
Networking Credibility
Objections Acknowledging
Influencing Mentoring
Educating
Presence

TODD COHEN | BUILDING SALES CULTURE™

www.toddcohen.com
todd@todddcohen.com

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Slide 2

"Presence"

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Slide 3

"You say it's win-win, but what if you're wrong-wrong and it all goes bad-bad?"

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Slide 4

Required Skills of Good Negotiators

- Have Patience
- Understand People
- Exude Confidence
- Are Open-Minded
- Remain Calm
- Seek Options – Collaborate
- Know the Minimum Acceptable Position

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Techniques & Tools

- Gaining Agreement
  - ✓ Brainstorm
  - ✓ Use an agent or 3rd party
  - ✓ Buy time to think
  - ✓ Work on developing partnerships
  - ✓ Find common ground
  - ✓ Make proposals that are easy to agree to
  - ✓ Find ways to "save face" for the other side

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Techniques & Tools

Exercise

- You are assigned to be the project manager for a new project and need to build out your charter but the Sponsor is not available, unwilling or not aware of the need. How would you use the following to achieve your goal of engaging the Sponsor?

  - ✓ Brainstorm
  - ✓ Use an agent or 3rd party
  - ✓ Buy time to think
  - ✓ Work on developing partnerships
  - ✓ Find common ground
  - ✓ Make proposals that are easy to agree to

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Biggest Source of Mistakes

Failure to Listen while negotiating, leading to …

- Misinterpreting the other party
- The inability to verify what was said
- Misunderstanding a question
- Making improper assumptions
- Being unable to respond appropriately
- Confusing the situation
- Slowing or halting the progress of negotiations
- Selecting the wrong strategies or tactics

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Joe's Negotiating Rules to Live By

1. Make sure your are negotiating with the decision maker
2. Pre-close from the start using gathering information questions
3. Watch, listen and learn – the person who learns the must has an edge
4. Remember to be quiet – think "ears" and "mouths"
5. You need 1 more reason for the other person to say Yes than they have reasons for saying No

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Joe's Negotiating Rules to Live By

Q – How do you build up a list of reasons for them to say Yes?
➢ Do your homework
➢ Ask questions early and often – then listen!

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Joe's Negotiating Rules to Live By

1. Email, texts, IM are not for negotiating @
2. The person asking the questions dictates the course of the conversation
3. If you're not willing to walk away you have "already bought"
4. Ye who goes first usually loses

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Joe's Negotiating Rules to Live By

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Joe's Negotiating Rules to Live By

Exercise
• How do you handle the situation if you have to go first?

   ✓ Discussing money when hiring a consultant or an employee
   ✓ Estimating a Milestone date with sponsor/boss/functional manager/SME
   ✓ Giving something up in return for peer/functional manager making a key resource available
   ✓ Scheduling a date for an audit, inspection, peer review, etc.

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Joe's Negotiating Rules to Live By

Joe's Negotiating Rules to Live By

1. Stop selling when you hear "Yes"!

Don't Sell Past the Close

Objections

"Every sale has five basic obstacles:
1. **no need**
2. **no money**
3. **no hurry**
4. **no desire**
5. **no trust."**

➢ Zig Ziglar

"Every sale has five basic obstacles: no need, no money, no hurry, no desire, no trust."

~ Zig Ziglar

SocialStrategizer.com

Objections

• They are a good sign
  ✓ Shows interest
  ✓ Tells you what is on their mind
  ✓ Gives you something concrete to deal with

KEEP CALM AND RELAX

Objections

- You need to be prepared for them – so do your homework
  - ✓ If I was them, what concerns (objections) would I have
  - ✓ How can I best overcome any potential objection
- You need 1 more reason they need to say yes than they have objections
  - ✓ Be creative
  - ✓ Be aware
  - ✓ Be persistent
  - ✓ Be a partner
  - ✓ Think of it as helping a SME, sponsor, team member make a good decision

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Objections

- To this point this section assumes you are "selling" the idea being negotiated

  Q – What would be different if you were the one being "sold"?

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Yes, And …

People and Communications

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The Basics

- Understanding People
- Asking a Question
- Validating

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Understanding… People @

DiSC Profile Methodology - What does it mean

Dominance
Person places emphasis on accomplishing results, the bottom line, confidence

Influence
Person places emphasis on influencing or persuading others, openness, relationships

Steadiness
Person places emphasis on cooperation, sincerity, dependability

Conscientiousness
Person places emphasis on quality and accuracy, expertise, competency

Behaviors
- Sees the big picture
- Can be blunt
- Accepts challenges
- Gets straight to the point

- Shows enthusiasm
- Is optimistic
- Likes to collaborate
- Dislikes being ignored

- Doesn't like to be rushed
- Calm manner & approach
- Supportive actions
- Humility

- Enjoys independence
- Objective reasoning
- Wants the details
- Fears being wrong

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My Profile

Dominance - *places emphasis on accomplishing results*
Influence - *Person places emphasis on influencing or persuading others*
Steadiness - *Person places emphasis on cooperation*
Conscientiousness - *Person places emphasis on quality and accuracy*

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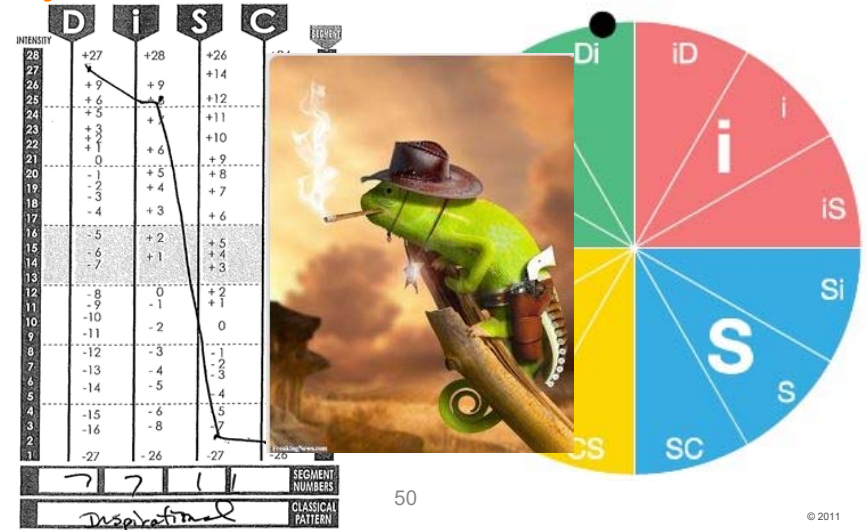
My Profile – 16 Personalities

THE ENTREPRENEUR

Code: ESTP-A
Role: Explorer
Strategy: People Mastery

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Dominance - *places emphasis on accomplishing results*
Influence - *Person places emphasis on influencing or persuading others*
Steadiness - *Person places emphasis on cooperation*
Conscientiousness - *Person places emphasis on quality and accuracy*

Exercise: Personality Profiling

S
✓ Are good at delivering on repeatable tasks
✓ Don't like risks or change
✓ Tend to get along with everyone
✓ Stable & predictable
✓ Loyal & Good listener

I
✓ Like positive motivating environment
✓ Enthusiastic and optimistic
✓ Will fill the air when there is silence
✓ Want to get along with everyone
✓ Like large groups
✓ Wants to make a good 1st impression

D
✓ Want immediate results
✓ Are fast at making a decision
✓ Like challenges & will take a risk
✓ Direct and to the point
✓ Will take charge when they see (perceive) a leadership vacuum
✓ Problem solvers

C
✓ Wants to know more - is analytical
✓ Follows the rules
✓ Likes subtle or indirect approach to conflict
✓ Need time to absorb a point before offering an opinion
✓ Systematic

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Profiling Yourself

Exercise

- Determine what your predominate and secondary personality profile is and place the associated colors on your name tent

- Determine if you identify with any particular emoticon, avatar, animal, cartoon character or thing

Exercise

- What are some good questions to determine someone else's style?

- What are some good ways to find out someone's style in addition to asking them questions?
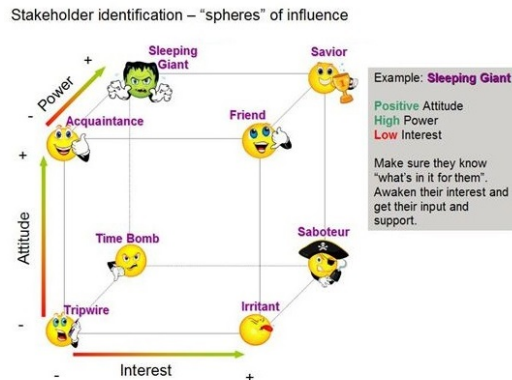

People Profiling

- Know yourself
  - ✓ BAs typically DC/IC
  - ✓ PMs typically DI/DC
  - ✓ Know your weaknesses/strengths – likes/dislikes
  - ✓ Best way to be approached for negotiations

- Know your negotiation partner
  - ✓ Their profile
  - ✓ How to best approach them
  - ✓ Their weaknesses/strengths – likes/dislikes
  - ✓ Have you built a relationship with them yet?!?

Know who can impact your project @

- Who are they
- Where they fall on the chart
- How to deal with each type

Note:
- Prioritize your time
- Put yourself in the "buyers" shoes

Stakeholder identification – "spheres" of influence

Example: **Sleeping Giant**

Positive Attitude
High Power
Low Interest

Make sure they know "what's in it for them". Awaken their interest and get their input and support.

Profiling Others

Exercise

- Thinking about a Sponsors on a present project you are leading and identify their dominate and secondary profile

- What techniques do you presently use to "sell" them?

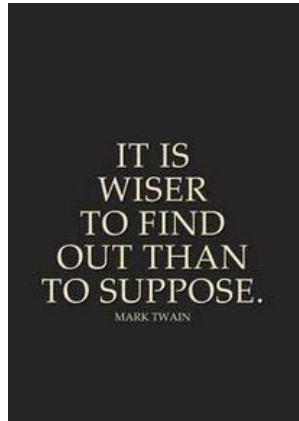- Are there any techniques you avoid when "selling" them?

Asking a Question

"It is wiser to find out than to suppose..."

➤ Mark Twain

IT IS
WISER
TO FIND
OUT THAN
TO SUPPOSE.

MARK TWAIN

"I have no Special Talents, I am just passionately curious."

➤ Albert Einstein

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Asking a Question

• Know when to ask a question, and how to do it effectively, by asking yourself:

  ✓ Am I trying to build rapport
  ✓ Am I looking to gather information
  ✓ Am I looking to lead the discussion to a particular end-point or decision

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Asking a Question

• Building rapport

  ✓ How was your weekend/doing anything fun this weekend?
  ✓ How is the family?
  ✓ I see you like … biking, sailing, baseball, Crown Royal, Dilbert, plants……
  ✓ What has been the highlight of your day so far?
  ✓ What project/task/opportunity are you passionate about?

  ✓ Wasn't that a tough meeting to sit through?
  ✓ Boy, you did a great job explaining that complicated topic – how did you do it?

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Asking a Question

Exercise
• Pick a topic you are passionate about and explain it to your partner
  ✓ What you are passionate about
  ✓ Why
  ✓ One unique fact
• Switch roles

• Your Partner then plays back what they Learned
  ✓ How close did they get to understanding you "thing" and your passion

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Asking a Question

- Gathering information

  - ✓ I haven't seen you around before are you new to the company/project?
  - ✓ What department do you work in?
  - ✓ What do you do?
  - ✓ What company/department were you at before your present job?

  - ✓ What features do you want/expect to see in this release
  - ✓ Are some features more important then others?
  - ✓ Is anything else going on in your world that may impact this project?

  - ✓ How do you see the project going so far?
  - ✓ Do you have any thoughts on the project assumptions we just reviewed?
  - ✓ How would you address the risks we just discussed?

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Asking a Question

Exercise

- What questions would you typically ask when:
  - ❑ On-boarding your sponsor
  - ❑ Understating detailed requirements
  - ❑ Estimating activity duration for a task
  - ❑ Validating priority order between Pace/Price/Perfection

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Asking a Question

- Leading the discussion

  - ✓ How do you see the project going so far?
  - ✓ Do you have any thoughts on the project assumptions we just reviewed?
  - ✓ How would you address the risks generated by the assumptions?
  - ✓ If we did … to mitigate the risks, would you help me talk to the sponsor to get their buy-in?

  - ✓ Do you think the milestones are achievable?
  - ✓ Where do you see the biggest challenge to meeting the milestones?
  - ✓ How would you handle the challenges?
  - ✓ If I did …. would you support it?

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Asking a Question

- Be open to hearing the feedback
  - ✓ Ask questions
  - ✓ Listen
  - ✓ Put on your body armor

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Asking a Question

- Hints

  - ✓ Validate anything important enough to impact your project
  - ✓ When speaking with someone spend more time listening then talking

When you talk, you are only repeating what you already know. But if you listen, you may learn something new.
rishikajain.com

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Validating

- How can you tell when a team member isn't telling the Truth

  - ✓ Their lips are moving….

- What to do?

  - ✓ Ask a clarifying question
  - ✓ Confirm in writing
  - ✓ Play back what you heard for confirmation
  - ✓ Ask the question again – a different way – as often as needed

Note:
  - ➤ How can you tell when a Sponsor, other executive or SME isn't telling the Truth?

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- What questions would you typically ask when:
  - ❏ On-boarding your sponsor
  - ❏ Understating detailed requirements
  - ❏ Estimating activity duration for a task
  - ❏ Validating priority order between Pace/Price/Perfection

Validating

Exercise

- What are other ways to ask the following questions:
  - ✓ Tell me about the project you want me to manage
  - ✓ What features are required? Optional?
  - ✓ How long will it take to get that task completed?
  - ✓ How much time will it take to complete?
  - ✓ Do I cut features, add budget or expand the project timeline?
- What are other ways to confirm, clarify and validate
  - ✓ Project goals, scope, assumptions, timeline, resources
  - ✓ Requirements
  - ✓ Project task duration, effort and resources assigned
  - ✓ Priority between Pace, Price or Perfection

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Recapping

- Using Inductive Reasoning

  - ✓ You need to have authority or Influence to be successful at negotiating
  - ✓ To have influence you need to have their trust and respect
  - ✓ To have influence, trust and respect you need to understand yourself and the person you are talking with
  - ✓ To understand someone to have influence, trust and respect you need to know who to engage because they may impact your project
  - ✓ Once you know who may impact your project you need to ask them questions to build respect and trust so that you can influence them as needed

  - ➤ It's as simple as that…..

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Yes, And …

Accelerators

Accelerators

- Getting to a Decision
- Trust and Respect
- Connecting with your negotiations partner

Getting to the Decision Maker

Exercise

- Define the following terms:
  - ✓ Authority
  - ✓ Power

  - ✓ Influence
  - ✓ Control

- Why is it important to be trusted and respected when "selling"?
- What are the ways you build trust with others?
- What are the ways to hurt the trust of others or a group?

Authority/Power - Influence/Control

Authority
- A power or right delegated or given
- The power to determine, adjudicate, or otherwise settle issues or disputes; jurisdiction; the right to control, command, or determine
- The **right** to exercise power given by another

vs. Power
- The possession of control or command over others; authority; ascendancy
- The ability or **might** to influence people or events

Control
- To direct the behavior of (a person or animal) : to cause (a person or animal) to do what you want : to have power over (something) : to direct the actions or function of (something) : to cause (something) to act or function in a certain way

vs. Influence
- The power to change or affect someone or something : the power to cause changes without directly forcing them to happen

Pre-Qualifying

Exercise

- What are some questions you can use to pre-qualify when you are preparing to negotiate a decision:
  - ✓ Access to a key resource for 80 hours over the next 4 weeks
  - ✓ Engagement from your sponsor when there is a critical issue to resolve
  - ✓ How long a task will take for a critical path item
  - ✓ How to get someone to work on a task sooner than presently planned
  - ✓ Getting Accounts Payable to process a payment off-cycle
  - ✓ A change of scope that will project impact

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Pre-Qualifying

- Know how to pre-**qualify** the deal
  - ✓ What is it you are hoping to accomplish?
  - ✓ What problem are you experiencing that I can help with?
  - ✓ If I/we get Security to approve….
  - ✓ If the sponsor is ok with this exception will you….
  - ✓ I hear you need to ….
    - ❑ Meet Security targets
    - ❑ Reduce project spending
    - ❑ Deliver the project on time
    - ❑ Deliver all the features promised

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Agreement doesn't equal consent

- Beware of phrases like:
  - ✓ I think that sounds like a good idea
  - ✓ That is a creative approach to solving the problem
  - ✓ That's something I might be able to get behind
- Confirm and clarify (remember to document the agreement)

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Recapping

- Prequalify

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Trust

- **Wikipedia**: One party (trustor) is willing to rely on the actions of another party (trustee)

  Dictionary: Assured reliance on the character, ability, strength, or truth of someone or something - one in which confidence is placed

  Q – Why is trust a key part of negotiations?

Trust Inhibitors

- Betrayed their trust in the past
- Little or no understanding of the other person or group
- Not listening or paying attention to the person or group
- Not communicating in the other person or group's "language"
- No relationship with the other party

Building Trust

- Build trust with someone or any group when you get the chance, even if they aren't in your project's sphere of influence – yet
  - ✓ Listening to the other party
  - ✓ Delivering on your promises
  - ✓ Talking "their" language

- Focus on the key Stakeholders first
- Start early – before you need it
- It takes time to build trust and an instant to lose it

Trust and Relationships

"Best way to sell something: don't sell anything. Earn the awareness, respect, and trust of those who might buy."

– Rand Fishkin, CEO and Founder, SEOmoz

Connecting: Know Your Facts

- Metrics
  - ✓ People most often trust metrics more than "my experience says" and conjecture
  - ✓ Knowing the details helps with your confidence
- Don't get caught off-guard with the other person knowing more than you
- It really helps with the "Detail-Oriented" types
  - ✓ Even with the "C" level – when they ask that "2nd question"

Connecting: Know your Partner

- Put yourself in your "partner's shoes"
  - ✓ Know your partner
  - ✓ Understand their role in the organization
- The other person often only cares about:
  - ✓ What's in it for them
  - ✓ Their perception of the value of what is being negotiated
  - ✓ Outcomes / Life after the project is complete
  - ✓ Looking good to their peers and their boss
  - ✓ Their day job
  - ✓ Their role in the project

Connecting: Talk Their Language

- How would you address the following:
  - ✓ CEO/Top Dog
  - ✓ COO
  - ✓ CIO
  - ✓ PMO/Portfolio Leader
  - ✓ Business/Functional Leader
  - ✓ Sales
  - ✓ Marketing
  - ✓ Finance
  - ✓ HR
  - ✓ Subject Matter Expert (SME)

Talk Their Language Example

	Sponsor, Stakeholders and Organization	PMO and IT
Project is about:	Delivering organizational benefits	Being on-time, on-budget, with requested feature - following process
Status:	Are we on track for meeting goals/delivery of the benefits?	Are we on track for meeting deadline, budget, with requested features
Risks & Issues are:	Something that impacts the project goals or prevents delivery of benefits	Something that impacts the goals, deadline, budget, requested features
Metrics they care about:	What we need to track to know if we are reaching the business goals and benefits	What we need to track to know if we are on time, on budget, with requested features

Talk Their Language Example

Exercise

- You need to make a presentation to a Sr Manager on why they need to support an unusual project/proposal you are championing
  - ✓ Finance
  - ✓ Human Resources
  - ✓ Security/Regulatory
  - ✓ Information Technology
  - ✓ Project Management Office

- What terminology would you utilize, shy away from for each?

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Yes, And …

Your World

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The Project World

- Examples within the Project World
  - ✓ Scope start/change
  - ✓ Deadline start/change
  - ✓ Budget start/change
  - ✓ Resource start/change
  - ✓ Timeline start/change

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Situational Examples - Business Analyst

- You are assigned a new project and need to:
  - ✓ Schedule time with the lead SME
  - ✓ Build the list of requirements/features
  - ✓ Design screens or forms
    - ❑ What do you need to negotiate?
    - ❑ Who are you negotiating with?
    - ❑ What do you need to do to be successful?

- You are 3 months into a 6 month project and have been approached to:
  - ✓ Add 2 substantial requirements/features to the design of your project
  - ✓ While staying on the original schedule
  - ✓ While keeping your SME happy and engaged
    - ❑ What do you need to negotiate?
    - ❑ Who are you negotiating with?
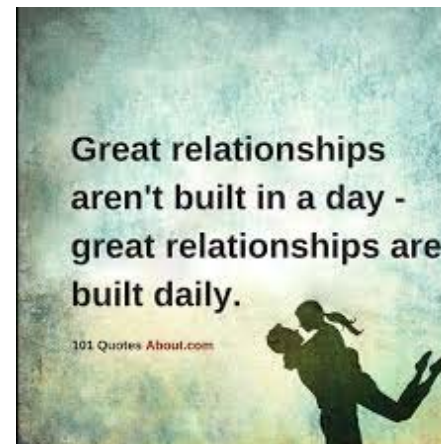   - ❑ What do you need to do to be successful?

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Situational Examples - Project Manager

- You are assigned a new custom development project and need to:
  - ✓ Build out the project scope, plan and identify and manage project risks
  - ✓ Acquire resources for the team
  - ✓ Define (or clarify) the processes to be utilized throughout the project
    - ❑ Who are you negotiating with?
    - ❑ What do you need to negotiate?
    - ❑ What do you need to do to be successful?

- You are 2 months into a 9 month project to acquire and deploy a new software product and have been requested to:
  - ✓ Add 2 substantial requirements/features to the scope of your project
  - ✓ Try and stay on the original budget and timeline
  - ✓ Keep everyone happy and engaged
    - ❑ Who are you negotiating with?
    - ❑ What do you need to negotiate?
    - ❑ What do you need to do to be successful?

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Yes, And …

Great relationships aren't built in a day - great relationships are built daily.

101 Quotes About.com

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Summary

- Why is it important ton know the difference between Authority and Power?
- What are the 3 reasons to ask a question?
- What are the 3 axis for Stakeholder Identification?
- What are some of the inhibitors to Trust?
- What is the biggest mistake made when negotiating?
- The biggest communication problem is that we do not ….
- Why are Objections good?
- What are the Negotiating Rules to Live by
- Agreement doesn't equal…..?
- When did your career as a negotiator start?

- If you only remember 3 things….
  - ✓ Build relationships before you need to negotiate
  - ✓ Know what's in it for them so you can be a partner and think win-win
  - ✓ Prequalify early on

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How many of theses were you aware of when they happened?

One Final Last Thought

What tools and techniques did I use to Influence the outcome I wanted today….

1. How many times did I make an effort to sell the topic and concepts?
2. Presentation title
3. Set-up/configured the meeting room
4. Rearranged some seating
5. Used an Agenda
6. Provided my background
7. Utilized a tool (PowerPoint) to control the pace and content of the meeting
8. Provided Hand-outs - without some slides
9. Socialized before the presentation - asked people I met before presentation to help out
10. Asked for participation - in the slide deck and directly
11. Determined if an activity was Individual, Group or Team
12. Asked for background from everyone
13. Offered treats – bribes/candy
14. Asked a question
15. Encouraged asking questions
16. Called on – cornered people
17. Utilized examples to emphasize my points
18. Was quiet while waiting for responses
19. Asked to have an assistant/scribe help me – Thank you Vanna
20. Jokes, Quotes and Graphics
21. How I dressed

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